



## Executive Summary

### Overview

The Fredericksburg Area Tourism (FAT) organization contracted Randall Travel Marketing (RTM) to conduct a comprehensive study including visitor research and strategic planning. The study was conducted July – December 2000. The primary elements of this study included:

- **Reconnaissance:** a thorough mystery shopping and site evaluation was conducted by a team of tourism professionals. (trips conducted in July, August, October and November).
- **Intercept Interviews:** random intercept interviews were conducted with a range of visitors to Fredericksburg, Spotsylvania and Stafford jurisdictions.
- **Mail Survey:** mailed to a random sample of 1,000 inquiries to FAT, and generating a 24% return.
- **Current Status Audit:** analysis of past and current tourism revenue collections, funding methods for promotion, actual promotional expenditures and budget, growth of infrastructure, and return on investment.
- **Executive Interviews:** interviews were conducted with city and county elected officials, administrative staff, attractions, lodging, merchants, residents, community opinion leaders, and business community contacts.
- **Strategic Plan:** recommendations for growth.

### Summary of Research Findings and Recommendations

The Fredericksburg area is clearly perceived to be a high-quality tourism destination. This is evidenced in the very high satisfaction rating (4.39, or A- on a 1-5 scale) and the willingness to return (70.75% of respondents say they will return the next year). Additionally, many individual attractions are rated quite highly.

The primary appeal of the area includes:

- Overall historic atmosphere of the area
- Historic downtown Fredericksburg shops and dining
- Civil War Battlefields
- Historic sites and museums

According to our research, the typical tourist is visiting the Fredericksburg area primarily for Civil War History interest (35.29%) visiting friends and family (17.65%) or for a vacation or getaway (17.65%). They stay primarily in hotels and motels (65%) and with friends and relatives (15.00%). They live in the Northeast U.S. (New York and New Jersey), Pennsylvania, Ohio, Virginia, California and Michigan and travel along the I-95 Corridor. 67.44% of visiting parties contain adults only (typically a 2 adult travel party). They typically stay 0-3 nights. The average visitor is age 51 and well educated.

The average daily expenditures reported include:

<i><b>Area</b></i>	<i><b>Average Amount</b></i>	<i><b>% of Total</b></i>
1. Food/meals	\$88.14	27.36%
2. Lodging	\$84.48	26.23%
3. Trans., fuel, airfare, etc.	\$57.16	17.75%
4. Attractions/amusements	\$51.77	16.07%
5. Shopping	\$40.55	12.59%
<b>TOTAL</b>	<b>\$322.11</b>	<b>100.00%</b>

RTM is concerned that the numbers reported here are not ideal for the Fredericksburg area. Shopping should be the highest expenditure category. This tells us that there is great potential in increasing the shopping opportunities for visitors to the area.

Tourists were asked to identify attractions and products that would offer the most appeal to them for product development purposes. The data tells us that the most likely to succeed new products would be:

- Civil War reenactments 70.94%
- Arts & crafts festivals 64.53%
- George Washington museum 63.68%
- Multi-entertainment complex with hotels/shops/entertainment 56.84%
- One-man shows (Lee, Grant, Washington) 48.72%

Our analysis shows that the FAT marketing program has produced good results. RTM studied each jurisdiction's tourism marketing organization, budgets, funding, and results measures.

## Strategic Direction

Based on data reported in this study, RTM recommends a strategic direction for Fredericksburg Area Tourism (FAT) that includes:

- A. *Advance FAT organization to become a free standing tourism authority funded jointly by the three jurisdictions. This authority would have a board appointed by the three jurisdictions and be comprised of direct stakeholders (hoteliers, attractions, restaurants, and merchants). Also, public/private cooperative efforts need to be a part of this organization.*
- B. *Institute funding for the new organization based on 100% of the total lodging tax collected by each of the jurisdictions, plus 40% of the food and beverage tax collected. Other proceeds would be generated by public/private cooperative marketing programs.*
- C. *Hire a new executive director that has demonstrated experience in marketing historic and heritage areas, has demonstrated sound business practices, understands sustainable tourism, and has no built in loyalty to any of the three jurisdictions.*
- D. *Develop a strong positioning and “brand” for tourism promotion, based on scientific research that captures the most compelling tourism attractors for visiting The City of Fredericksburg and the Counties of Spotsylvania and Stafford. This branding is to be used consistently and widely.*
- E. *Develop a marketing program that targets specific target markets with specific targeted messages, based on the overall positioning/branding.*
- F. *Analyze and document per-visitor expenditures (by market segment) and monitor increases in same as results measure.*
- G. *Develop a regional visitor center (conveniently located on I-95 or approaching downtown Fredericksburg) that provides a comprehensive overview and orientation for visiting the area.*
- H. *New tourism authority to serve as comprehensive resource for:*
  - *Researching market needs*
  - *Providing “wish list” of new tourism products and services*
  - *Partnering with the three jurisdictions for continued tourism infrastructure enhancement*
  - *Partnering with private enterprise and non-profit groups (attractions, lodging, restaurants, etc.) and supply marketing research guidance, coaching, and marketing development concepts.*
  - *Promoting and marketing the FAT region*
- I. *New tourism authority would be required to provide an annual report that documents return on investment for each of the three jurisdictions as well as other result measures.*
- J. *New tourism authority to encourage any efforts made by the National Parks Service to improve the interpretation and facilitation of the “edutainment” experience currently lacking at the three primary military parks in the area. RTM is particularly concerned that the lack of updated interpretation and facilities, particularly the visitor centers, could lead to a serious decline in overall visitation that would negatively affect the local economy. NPS efforts should begin at the Fredericksburg Battlefield Visitor Center and fan out through all battlefield areas in future years.*

The positioning recommended by RTM is:

## **Tempered by Revolution Torn by Civil War**

### **300 years of American history and fun**

***In the Fredericksburg region you'll experience The Battlefields of Civil War, the boyhood home of George Washington, historic downtowns and 3 centuries of American legends***

This statement positions the area clearly as a vacation destination. It combines the top reasons for travel to the region (Civil War history, atmosphere, vacation) and the specific top attractions in the region (downtown Fredericksburg shops and restaurants and Civil War Battlefields). It also forms a bridge to identified unmet needs (more focus on George Washington). It works for adults traveling without children and for families. It is believable and motivational.

Most importantly it communicates there is fun and entertaining experiences to be found. It is not enough for people to simply hear the names Fredericksburg, Spotsylvania and Stafford. We must sell the fact that this is a *historic atmosphere with entertaining things to see and do*.

This positioning statement would be used in all promotional efforts. This would be used on the front of the primary marketing brochure, print ads, web site and other marketing outreach materials.